## **PLICATION FOR RECORDS DISPOSITION STANDARD**

INSTRUCTIONS: Prepare in duplicate and forward to the Records Management Analyst, Management Systems Division FOR RECORDS MANAGEMENT DIVISION USE 3. Dept., Division, Subdivision & Administering Office Address General Manager's Office Date Received Application No. **Date Completed** Division of Budget and Analysis NOV 22 1977 NOV 17 1977 74 2200 Peachtree Summit 2. Dept. Application No. 1. Application 401 West Peachtree Street, N.E. Atlanta, Georgia 30306 6. Telephone Number 5. Working Title 4. Person to Contact Dot Sims Budget Technician 586-5062 7. Action Requested a. [] Establish Retention Schedule; record will continue to accumulate. b. Dispose of present accumulation; no further accumulation anticipated. c. Amend Application No. 74-275 Check One: Change; Supercede; RVoid 9. Records Series Title (followed by title used in office; if different) 8. Dates of Series **Earliest** Latest Federal Grants File What is the function of the Division and the Office in which this record series is created? 10. Division and Office Function SEE ATTACHED. This file contains the following documents (include form numbers and titles, if any): 11, Record Series Description Attach samples of the file. Documents relating to: This function is no longer being performed. included are: File is arranged: 12. Monthly Reference Rate How often are records referred to which are: One to six months old \_\_\_\_\_\_; Seven to twelve months old \_\_\_\_\_\_; Thirteen to twenty-four months old \_\_\_\_\_\_ twenty-five months and older \_\_\_ 13. Annual Rate of Accumulation of Records .....; Legal-size drawers \_\_\_ \_\_\_\_\_; Shelves \_\_\_\_\_\_; Other (specify)

3012 (3/76)

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ES NO		"X" in the proper column)			
	a. Is this the official cor	by of the series?			•
	If not, where is it?		<del></del>		
	b. Does the series conta	in confidential information requir	ing security handling? If	yes, cite law or regulation.	
		i			
	c. Is this a vital record?				
	d Riche Unightuniae have	historical or long term research va	lue?	,	
1	(I) Bross (H76) (See )	aments in the life make it necessa	ay to keep the entire life	e for a long period, could these d	ocuments be
j	· ·		• • • • •		
	scheduled separately	/	d2 If you attach conv		
	f. Is the information co	ontained in this series ever published	de 1/2 ded in a et	immarized report?	
	g. Is the information co	ontained in this series ever analyze	and/or recorded in a sc	Allitiarized report:	
1	If yes, attach copy.				
	h. Is there a duplication	of this series in your office, or in	another office or agency	Α.	
	If yes, where?	<u> </u>			
	i. Is this series (or a ma	njor portion of it) regularly microf	ilmed?		
	i Does the record serie	es result in a computer printout?			
	ntion Requirements	The following requ	uires the series to be kep	it:	
5. Reter	ntion Requirements	• • • • • • • • • • • • • • • • • • • •			
		Vare	d. Audit period		years.
	tate Law	years.	e. Administrativ	ve need	years.
	statute of limitation	years.		ition instructions	years.
c. Fe	ederal law	years.	r, rederal reten	don manachona	
	•			•	
Attac	ich copy or excert of laws or regu	lations. Explain administrative ne	∌d.		
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		•			
	•				
16. Appr	proved Disposition Instructions	This agency recommends t	hat the file series be cut	off at the end of each:	
io. Appi	TOVEL Disposition management				then,
		[] Calendar Year; [] Fis	cal Year; LI Other		
□⊦	Hold in the current files area	month(s)	year(s); then		
Пт	Transfer to local holding area; hol	ld year(s); then			
		; hold year(s); the	n		
	Destroy.				
	Transfer to State Archives for per	manem retention.			
LJ C	Other (Specify)		V		
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The		and future accumulations of the s	er ies.		
The	ese instructions apply to all prior				
The	ese instructions apply to all prior			ite additional remarks):	
	ese instructions apply to all prior	and future accumulations of the s		ite additional remarks):	
17. APE	ese instructions apply to all prior (In	idicate briefly rationale for recom	mendations above/or wri	ite additional remarks):	Date
	ese instructions apply to all prior (In PPROVALS oved Department Records Man	idicate briefly rationale for recom	mendations above/or wri		Date ////6/77
17. APP	ese instructions apply to all prior  (In PROVALS  oved Department Records Man  Abgul Julle	idicate briefly rationale for recom	Approved L		Date 1/1/6/77
17. APE	ese instructions apply to all prior  (In PROVALS  oved Department Records Man  Abgul Julle	idicate briefly rationale for recom	Approved a	Wish Croudy	11/16/77
17. APP	PPROVALS  Oved Department Records Man  White Sulle  Oved Division Head/Designee	ndicate briefly rationale for recoming the sagement Officer Date    1	Approved D	egal Couns Wy W Lusury Devisign of Audit	1/16/77 (2/41/11
17. APP	ese instructions apply to all prior  (In PROVALS  oved Department Records Man  AGUL Sulle  oved Division Head/Designee	ndicate briefly rationale for recoming the sagement Officer Date    1	Approved D	Wish Croudy	1/16/77 11/10/77 Date
17. APP	PPROVALS  Oved Department Records Man  White Sulle  Oved Division Head/Designee	ndicate briefly rationale for recoming the sagement Officer Date    1	Approved D	egal Counsy  WY WOUN  Devision of Audit  Department of Archives and History  Canall Har	1/16/77 paig 1/10/77 Date
17. APP	PPROVALS  Oved Department Records Man  Oved Division Head/Designee  Oved Department Head/Designee	ndicate briefly rationale for recoming the second s	Approved D	egal Couns Wy W Lusury Devisign of Audit	1/16/77 11/10/77 Date 11-22-77
Approx	PROVALS  Oved Department Records Man  Oved Department Head/Designee  Oved Department Head/Designee  Oved Records Management And	ndicate briefly rationale for recoming the second s	Approved D	egal Counsy  WY WOUN  Devision of Audit  Department of Archives and History  Canall Har	1/16/77 11/10/77 Date

For Records Management Division Use

## Application for Records Disposition Standard

Department, Name, and Full Address

MARTA

Atlanta, GA	•	U Equitable Bldg.	AUG - 7 1974 74-275 AUG 23 197
Appl. Date 52	2-4460 x-38	Name Person to Contact Sam Daniel	Budget Analyst
Inclusive Dates of 1972 - Pres	f Series ent	Exact Series Title Federal Grants File	
Action Requ	ested 🗷 🖁	stablish Disposition Standard ecord will continue to accumulate	Dispose of Present Accumulation; No Further Accumulation Anticipated

That is the function of the office in which this record series is created?

Dept. of Finance & Adm./Division of Budget & Analysis

The Division of Budget and Analysis is responsible for development and installation of operating and capital budgets for all units of the Authority, conducting ongoing analysis and review to ensure that expenditures do not exceed amounts budgeted and/or authorized, performing continuing research regarding cost aspects of MARTA's programs and policies. and for comprehensive analysis of revenues. In addition, the Division is responsible for coordinating financial matters with other local governments, the preparation and/or review of MARTOC financial reports, and supporting other Divisions who may have special budgetary control problems.

This file contains the following documents:

Documents relating to budget analysis of Federal grants.

Files include copies of financial status reports, expenditure reports, and technical studies relating to grants and papers reflecting the Division's analysis of these reports and studies. Also, related correspondence is included.

File is arranged numerically by grant number.

Equipment Occupied	vert	Lat.	No. of Drawers	Cuft of Records	Equipment Occu	pied	Ver t	Lat	No. of Draw	243	Cu. ft.	of Recor	<u>ds</u>
Letter-Size File Drawers		х	1								ļ		
Legal-Size File Drawers					Annual Rate of I	Accumulation	on		1½				
	1	-			Hoor Space Occup	sed (Square	: fee	<del>(</del> †)	in Office (	5) .	In Ston	age Area	(5)
	1				Average Daily Rete	rences This Y	ears	,	last Yeors	Precedit	o Years	All Prior Y	ear

	QUESTIONAIRE (Place an X in the proper box. If anow	ver is "Yes" please explain	.) · · · · · · · · · · · · · · · · · · ·
13	Is this the Record Copy of the series? (Accounting he	· · · · · · · · · · · · · · · · · · ·	Yes 🔀 No
14	Is there a duplication of this series in another office	or agency?	🔀 Yes 🔀 No
15	Secres is NOT tompletely duplicating  Is the information contained in this series ever summaria	zed or published?	Yes 🔀 No
16	Does the series contain classified information requiring	security handling?	Yes X No
17	Does the series initiate, amend or terminate agency poli	cies and procedures?	Yes X No
18	Could the function be performed if the files were lost of	r destroyed?	Yes No
19	Is the series (or major portion of it) regularly microfi	lmed? If yes, why?	Yes X No
20	Does the record series provide data as input to an EDP f	ile?	Yes 🔀 No
21	Does the record series contain documentation produced as	EDP printout?	☐ Yes ⊠ No
22	Has the Federal Government issued instructions governing UMTA Operating Manual	the retention/ disposition of	of these files? X Yes No
23	Will there be a need for these records 10, 15 years from	now? If yes, what?	☐ Yes 🔀 No
24	REQUIREMENTS:	. '	
	The following requires the files to be kept 4 years for the retention requirement.  By decision of the Director of Budget and A		Statute, or other reason
	State Statute of Audit Law Limitation Period		ministrative
	•	•	
25	RECOMMENDATIONS - Methods: This unit recommends	that the file series be cut	off at the end of each
25	RECOMMENDATIONS - Methods: This unit recommends  Calendar Year X Fiscal Year Other, then		off at the end of each
<b>25</b>		<b>!</b>	सं क्षेत्रह
25	Calendar Year K Fiscal Year Other, then	en 🔀 Transfer to - State Rec	ords Center;
<b>25</b>	Calendar Year  Fiscal Year Other, then  Hold in the current files area 1, years; then  Mold 2, then  Destroy after cut-off.	en 🔀 Transfer to - State Rec	ords Center;
<b>25</b>	Calendar Year K Fiscal Year Other, then Hold in the current files area 1/ years; the  Hold 2	en 🔀 Transfer to - State Rec	ords Center;
25	Calendar Year  Fiscal Year Other, then  Hold in the current files area 1, years; then  Mold 2, then  Destroy after cut-off.	en 🔀 Transfer to - State Rec	ords Center;
25	Calendar Year  Fiscal Year Other, then  Hold in the current files area 1, years; then  Mold 2, then  Destroy after cut-off.	en 🔀 Transfer to - State Rec	ords Center;
25	Calendar Year   Fiscal Year Other, then   Hold in the current files area	en 🔀 Transfer to - State Rec	permanent retention.
ę .	Calendar Year   Fiscal Year Other, then  Hold in the current files area, years; then    Mold, then   Destroy; or   Tr.    Destroy after cut-off.  Operating Instructions:  APPROVALS:  Oved Department Records Management Officer Date	en X Transfer to State Rec ansfer to State Archives for Review / Approval by Departmen	permanent retention.
ę .	Calendar Year Fiscal Year Other, then  Hold in the current files area 1, years; then  Mold 2, years; then Destroy; or Tr.  Destroy after cut-off.  Operating instructions:  APPROVALS:  oved Department Records Management Officer Date  Description Read Designer Date	en X Transfer to State Rec ansfer to State Archives for Review / Approval by Departmen	permanent retention.
26 Appropri	Calendar Year   Fiscal Year   Other, then   Hold in the current files area 1, years; then   Hold 2, years; then   Destroy; or   Tr.   Destroy after cut-off.   Operating Instructions:  APPROVALS:  Oved Department Records Management Officer	en X Transfer to State Receansfer to State Archives for Review / Approval by Department	permanent retention.
26 Appropri	Calendar Year  Fiscal Year Other, then    Hold in the current files area 1, years; then   Mold 2, years; then   Destroy; or   Tr.    Destroy after cut-off.   Operating instructions:    APPROVALS:   Over Department Records Management Officer   Date	en X Transfer to State Rec ansfer to State Archives for Review / Approval by Departmen	permanent retention.
26 Appropri	Calendar Year Fiscal Year Other, then    Hold in the current files area 1, years; then   Mold 2, years; then   Destroy; or   Tr.   Destroy after cut-off.   Operating instructions:    APPROVALS:   Over Department Records Management Officer	en X Transfer to State Receansfer to State Archives for Review / Approval by Department	permanent retention.
26 Appr	Calendar Year  Fiscal Year Other, then    Hold in the current files area 1, years; then   Mold 2, years; then   Destroy; or   Tr.    Destroy after cut-off.   Operating instructions:    APPROVALS:   Over Department Records Management Officer   Date	en X Transfer to State Receansfer to State Archives for Review / Approval by Department	permanent retention.
26 Appr	Calendar Year Fiscal Year Other, then  Hold in the current files area,	en Transfer to State Recommendations:	permanent retention.
26 Appr	Calendar Year Fiscal Year Other, then  Hold in the current files area,	en Transfer to State Recommendations:	permanent retention.  For Archives and History  8-22-74

## DIVISION OF BUDGET AND ANALYSIS

## Functions and Responsibilities

The Division of Budget and Analysis is responsible for developing and implementing the operating budget of the Authority and reviewing the capital budget; conducting ongoing analysis and review to ensure that obligations and expenditures do not exceed amounts budgeted and/or authorized, performing continuing research regarding cost aspects of MARTA's programs and policies, and for comprehensive analysis of revenues and expenses.

The Division is responsible for coordinating financial matters with other local governments. The division also provides other divisions within the Authority with budgetary assistance. Other responsibilities are to assist in developing adequate and timely intermediate and long-term financing, to develop and maintain a comprehensive financial plan to serve as a tool in managing the MARTA program, to maintain the Authority's organizational manual, to review and analyze all proposed organizational changes and to recommend changes in organization, and to conduct special management studies as requested by the Office of the General Manager.